



AMERICAN WELL/ONLINE CARE GROUP

Safe and Secure Telehealth

Kofi Jones

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Our mission is to leverage innovation and technology to bridge critical gaps in health care in a safe and secure manner.

American Well, 2014

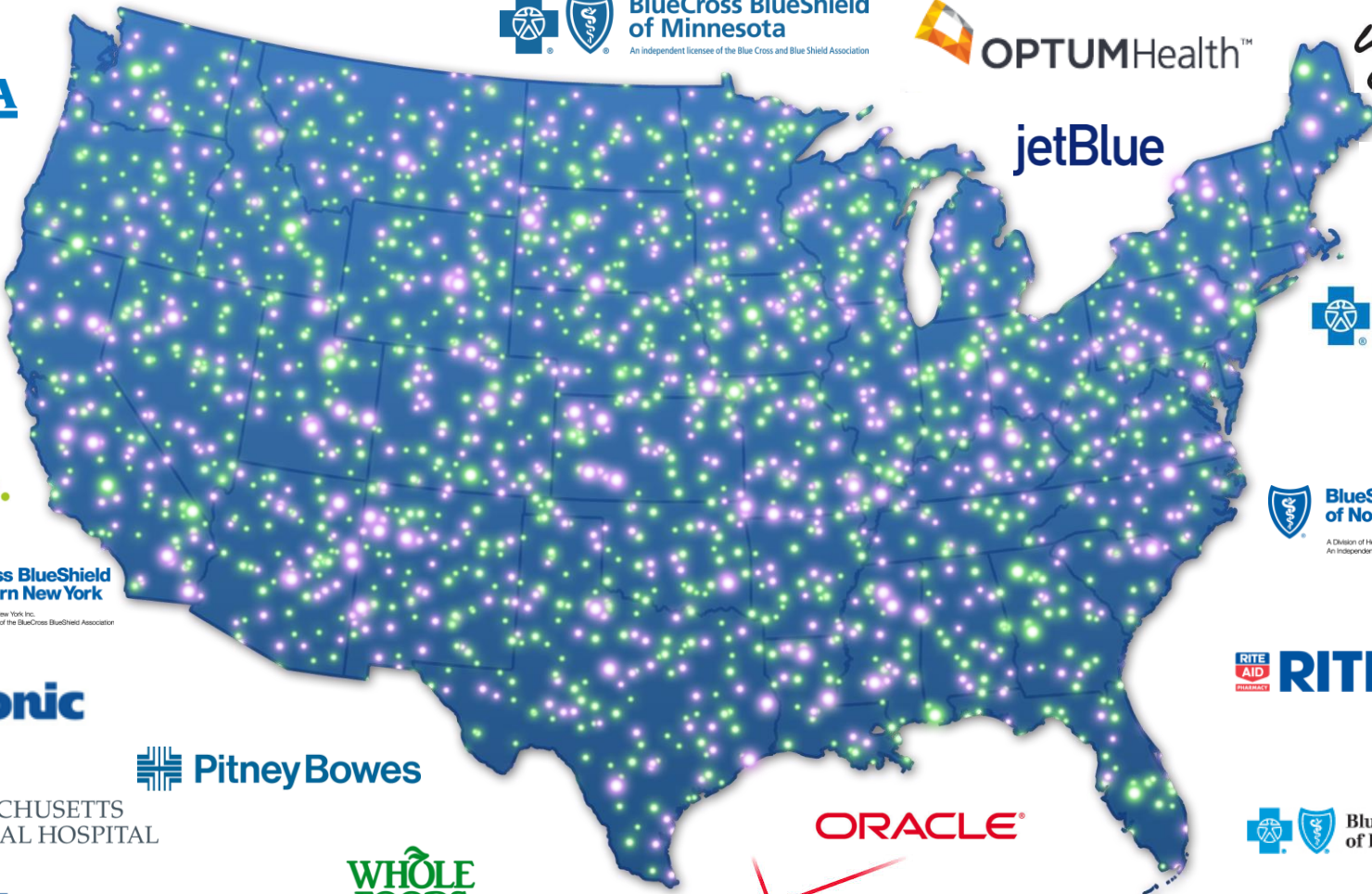


A physician-owned primary care group whose mission is to create a safe channel for patients to access the highest quality healthcare at any time.

Online Care Group, 2014



- Secure, virtual conversations between patients and duly licensed medical professionals brings **much needed resources to Americans who otherwise lack access;**
- Telehealth effectively helps to **address issues of distance, time, and cost;**
- Telehealth allows for **load balance supply and demand of clinicians** - excess capacity in one geography can be used to address unmet needs in rural and medically underserved areas;
- With the implementation of federal health care reform, telehealth is becoming an even more critical element of care delivery as the nation prepares for **increased provider shortages;**
- Telehealth is becoming widely accepted as a **vital and appropriate method of care delivery.**



Logos of partner organizations surrounding the map:

- Department of Veterans Affairs**
- WELLPOINT**
- UnitedHealthcare®**
- VALUEOPTIONS®**
Innovative Solutions. Better Health.
- ASCENSION HEALTH**
- BlueCross BlueShield of Minnesota**
An independent licensee of the Blue Cross and Blue Shield Association
- OPTUMHealth™**
- Wynn LAS VEGAS**
- jetBlue**
- MASSACHUSETTS**
- Blue Cross Blue Shield of Rhode Island**
- BlueShield of Northeastern New York**
A Division of HealthNew York Inc. An Independent Licensee of the BlueCross BlueShield Association
- BlueCross BlueShield of Western New York**
A Division of HealthNew York Inc. An Independent Licensee of the BlueCross BlueShield Association
- BlueShield of Northeastern New York**
- RITE AID**
- BlueCross BlueShield of Louisiana**
- ORACLE®**
- verizon**
- WHOLE FOODS MARKET**
- Pitney Bowes**
- MASSACHUSETTS GENERAL HOSPITAL**
- TRIWEST HEALTHCARE ALLIANCE®**
- Medtronic**
- Deloitte.**
- pepsi**
- GE**
- HMSA**
Blue Cross Blue Shield of Hawaii

Health Plans

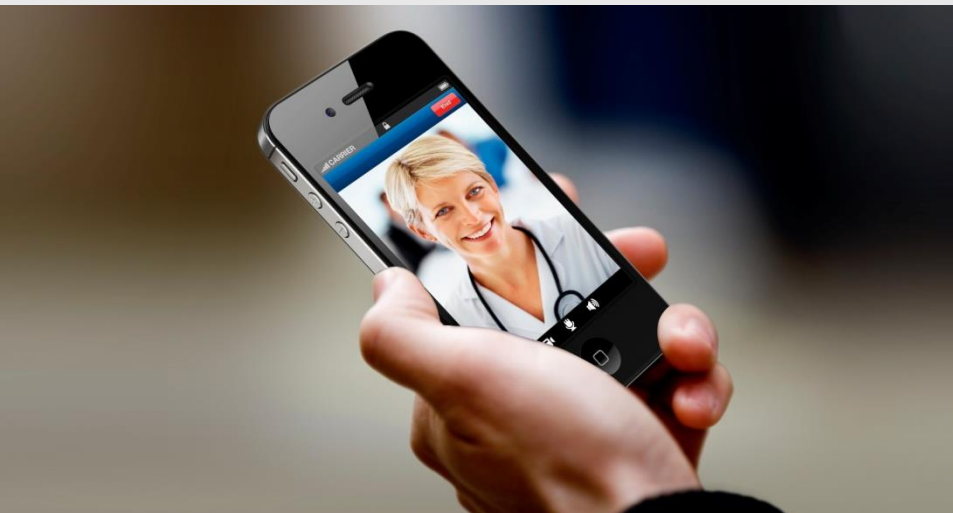
Employers

Pharmacy

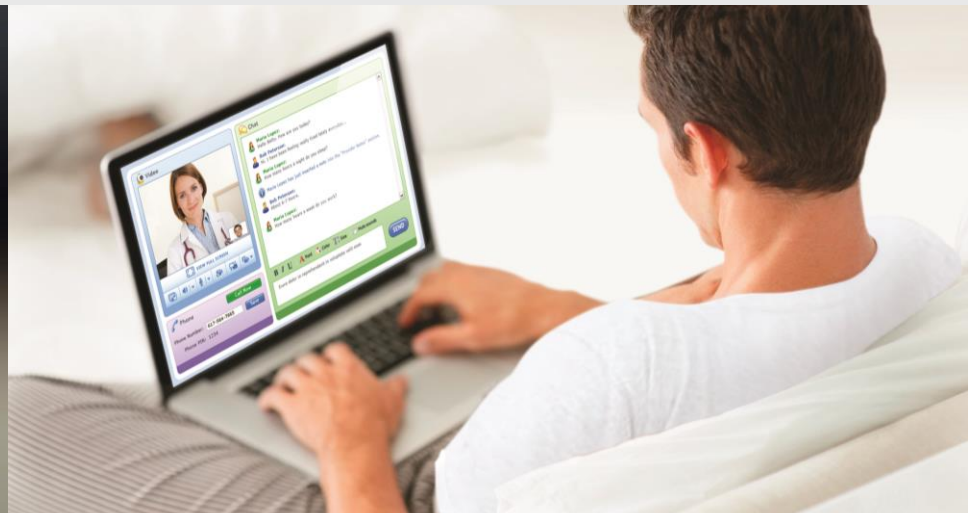
Government

Providers

We use technology to bring patients and providers together



Mobile



Web




Kiosk

Highest Common Denominator



Telehealth Operating Principles

- 
- A close-up photograph of a hand holding a black pen, poised to write on a document. The document features a bar chart with blue and purple bars. The background is slightly blurred, showing more of the document and the hand.
- **Audio-visual interaction** - Delivery by means of real-time video – not email, fax or phone/ not questionnaire based
 - **Identification** - Patient and provider clearly identified
 - **Patient choice** of provider
 - **Adherence to state licensure**
 - **Adherence to state regulation**
 - **Limited, state specific formulary**
 - **No controlled substances**
 - **Secure and HIPAA compliant**
 - **Informed care** - Availability of patient medical history
 - **Documentation** - Full **record** of consultation and evaluation
 - **Continuity of Care** - Two-way, **data exchange** with other treating providers
 - **Physicians are able to follow-up online and in-person**
 - **No quid pro quo** - **No assurance** of outcome for payment

How patients use telehealth



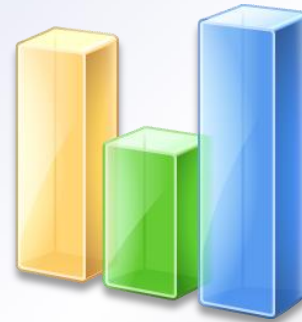
Over 1,200 distinct diagnoses have been made on American Well systems since 2012

Common diagnosis for urgent care include:

- Sinusitis
- Respiratory infection
- Bronchitis
- Urinary tract infection
- Pharyngitis
- Conjunctivitis
- Cough
- Influenza
- Allergies
- Dysuria

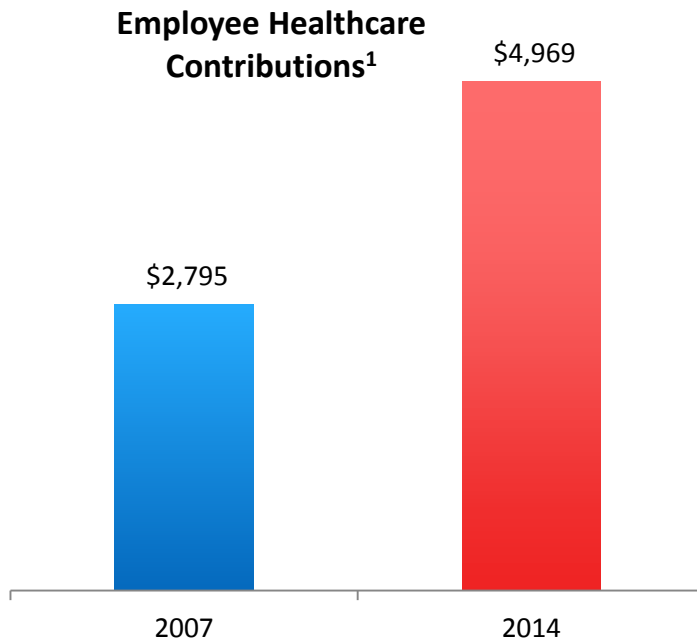
Source: American Well data, 2014.

The issues we're looking to solve

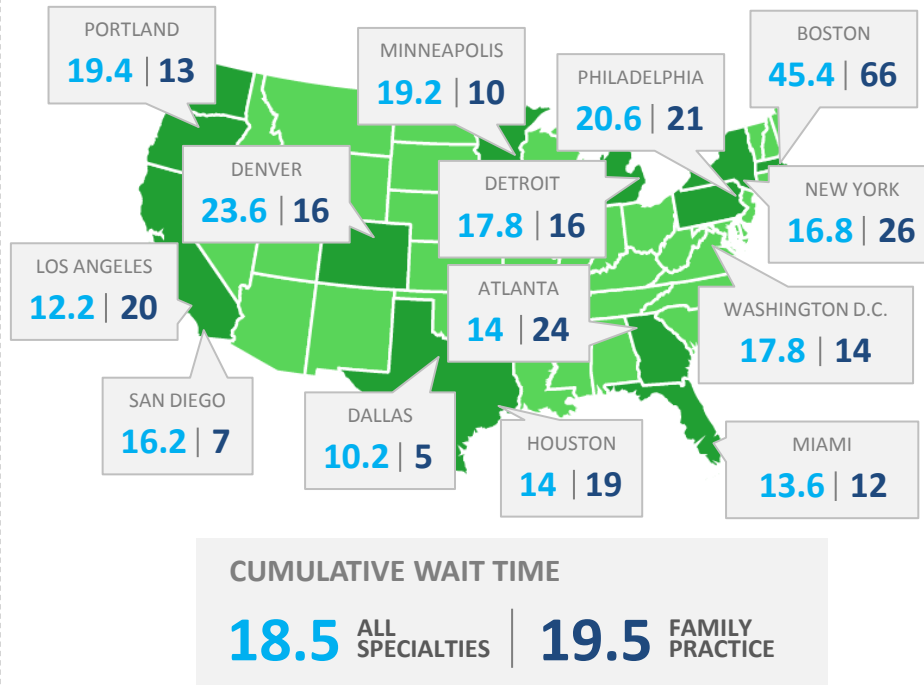


Healthcare's two biggest challenges are **cost** and **access**

Employees' healthcare spending has increased **77%¹** since 2007



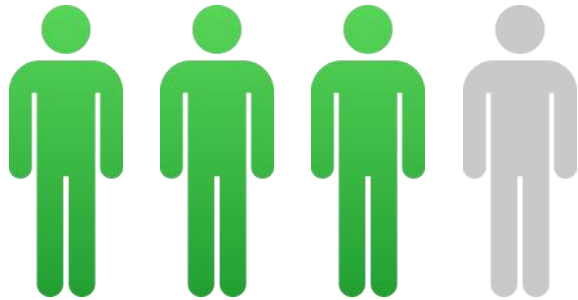
And they can't get in to see their doctors²



1. Forbes, In 2014, Workers' Share of Health Costs Nearly \$5,000 At Large Companies, October 17, 2013.
2. Merritt Hawkins, "2014 Survey: Physician Appointment Wait Times and Medicaid and Medicare Acceptance Rates", 2014.

Employees want telehealth. Employers need it.

Employees want to get their healthcare online



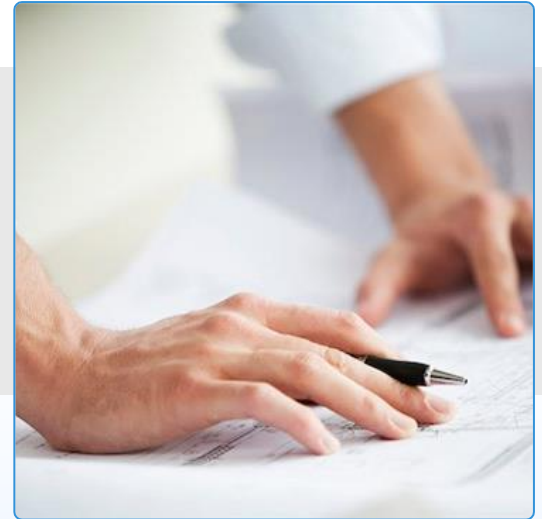
3 of 4 of patients want their doctors to offer online services¹

Towers Watson predicts telehealth could save US employers \$6b²



1. Advisory Board, "Telemedicine and Concierge Care: Trends in Consumerism and Non-Traditional Primary Care Delivery", 2014
2. Towers Watson, Current Telemedicine Technology Could Mean Big Savings, August 11, 2014.

Navigating the Landscape



Clinical Permissibility



Key Considerations

- Definition of establishing a physician/patient relationship
- Prescription restrictions
- Providing care via telehealth

Stakeholders

- State medical and pharmacy boards
- National organizations (e.g., FSMB, AMA)

Reimbursement



Key Considerations

- State legislation defines commercial and Medicaid reimbursement
- Medicare reimbursement currently restricts reimbursement to specific rural clinical sites

Stakeholders

- Federal and state policy makers
- Payers

Licensure



Key Considerations

- State licensure requires providers to be licensed where the patient is located
- Some states allow for reciprocity

Stakeholders

- State medical boards and policy makers
- National organizations (e.g., FSMB, AMA)

Federal

- **Nearly 40 bills already introduced during the 113th Congress** – include Health-IT component/ Telehealth Modernization Act, Tele-MED Act, Telehealth Enhancement Act, Medicare Telehealth Parity Act;
- **CMS** – will expand telehealth reimbursement within Medicare in CY15
- **Nearly all states** have some type of telehealth reimbursement within Medicaid/nearly half have a commercial mandate;
- **Federation of State Medical Boards** – issued new telehealth policy April, 2014;
- **American Medical Association** – issued new telehealth policy in June, 2015;

State

- **Multiple states** –formed working groups or processes to examine safe and secure expansion of telehealth (WA, FL, GA, OK, RI, TN, OH, ID, CO, VA, IA)
- **Many of these states** have upheld that the “standard of care should be on par” with in-person care: (FL, GA, WA, OK, RI)



Model Policy for the Appropriate Use of Telemedicine Technologies in the Practice of Medicine

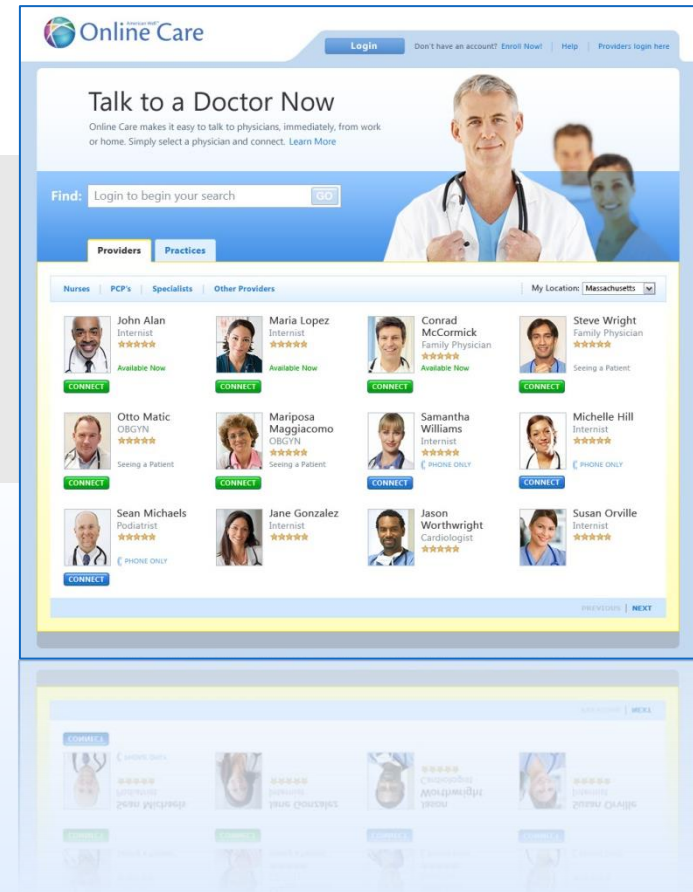
Ratified April 25, 2014

Recognized that telehealth can “improve the delivery and accessibility of health care”

Set forth key components in ensuring this care is delivered safely

- **Evaluation and Treatment of Patient.** Treatment made in an on-line setting should be held to the same standard of appropriate practice as those in traditional settings;
- **Establishing a Treatment Relationship Online.** A physician-patient relationship can be established using telemedicine, so long as the standard of care is met;
- **Audio/Visual.** Telemedicine typically involves the application of secure videoconferencing;
- **Patient Choice of Provider.** Whenever possible, a patient should have a choice of provider and not be assigned one at random;
- **Online Prescribing Safeguards.** Prescribing in a telehealth encounter should be at the discretion of the physician;
- **Ensuring Privacy, Security, Documentation, and Continuity.** Telehealth encounters should be HIPAA compliant, include informed consent, the generation of a medical record, and support continuity of care.

Questions





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